



DIOCESE OF WHEELING-CHARLESTON

• P.O. Box 230, Wheeling, WV 26003 •

Wednesday, July 17, 2019

WHEELING, W.Va.—Archbishop William E. Lori, Apostolic Administrator for the Diocese of Wheeling-Charleston, announced today the appointment of a new independent auditor for the Diocese of Wheeling-Charleston, a decision made in coordination with the Diocesan Finance Council.

The Archbishop announced that the firm, CLA (CliftonLarsonAllen) LLP— a national financial auditing firm that serves more than 30 dioceses across the country—has been engaged to be the auditing firm of record for the Diocese of Wheeling-Charleston. Among the first priorities of the firm will be to conduct a thorough audit of all Diocesan accounts, the results of which will be published in their entirety.

The Diocese of Wheeling-Charleston is routinely audited annually with portions of the audit report being published in the Diocesan newspaper, *The Catholic Spirit*.

“I am grateful to the members of the Finance Council who are working to identify best practices nationally that will help strengthen our financial protocols and procedures and ensure the trust and confidence of all,” said Archbishop Lori. “A commitment to responsible financial stewardship must be a non-negotiable as we deploy Diocesan resources to advance the work of the Gospel across the State of West Virginia and to serve critical needs.”

The Finance Council is also implementing a policy review to ensure that proper checks and balances are enforced, as well as strengthening internal controls and spending practices. In recent months, Archbishop Lori has expanded the Finance Council, which will continue to strengthen policies following revelations that the former bishop engaged in a practice of excessive spending by bypassing policies and procedures designed to protect against such activities. The publication of audited financial statements for the Diocese will serve to ensure adherence to rigorous financial controls.

A number of changes have already been made to the assessment model of the Diocese, used to fund parishes and missions throughout the state which cannot sufficiently provide for their own support. The new model benefits parishes, particularly those which support Catholic schools as well as smaller parishes in debt. The assessment model is the formula used to calculate the three percent assessment on all parishes in the Diocese, which is combined with more than \$5 million in Diocesan funds annually. Under the new model, Diocesan assessments will be lower than roughly 90 percent of other dioceses across the country.

Additional measures currently being implemented in the Diocese to enhance accountability and transparency include the introduction of an independent third-party reporting system that will allow any person to report concerns about – or actual instances of - financial mismanagement, sexual harassment or abuse by members of the clergy, the local bishop, lay employee or volunteer of the Diocese of Wheeling-Charleston. Also, on July 2, 2019, the board of the Bishop’s Fund voted to dissolve this entity, established in 2014 as a discretionary fund to support various capital and programmatic projects across the Diocese. The remaining assets are being transferred to the general account of the Diocese. Finally, the official bishop’s residence, ordered to be listed for sale by Archbishop Lori last month, is currently under contract and is expected to be finalized in the coming days.

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